GROUPWARE TECHNOLOGIES, INC.

Provide® Enterprise Care Management Software

Status Neutral User Guide

Provide® Enterprise

Status Neutral User Guide

Updated January 2022

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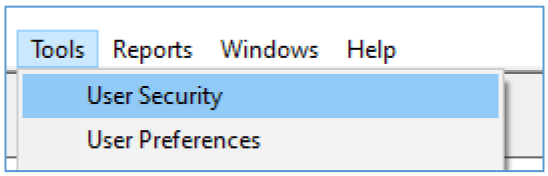
Introduction

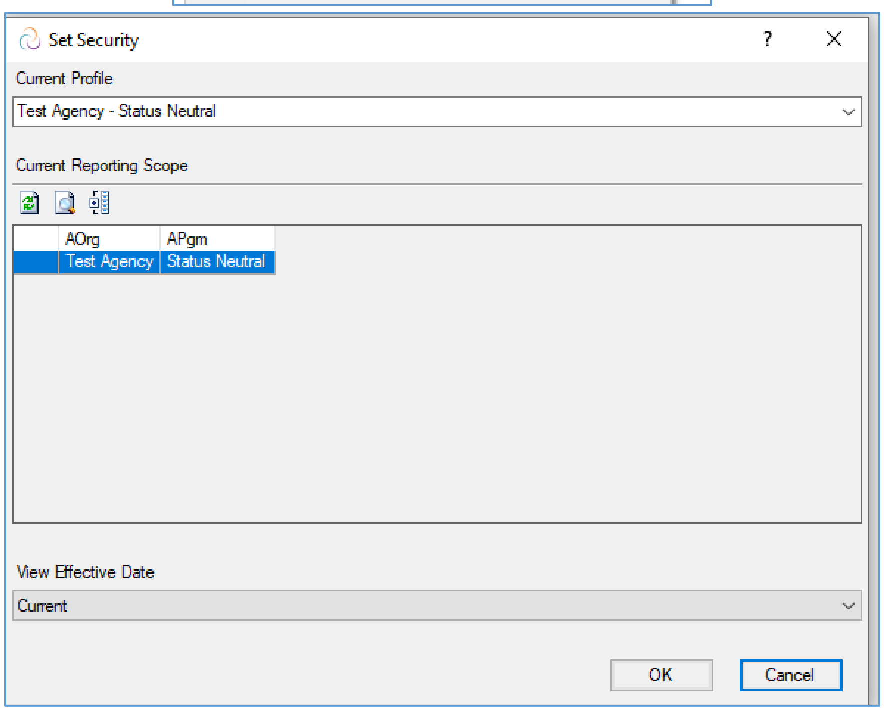
The Virginia Department of Health has chosen to use the Provide Enterprise (PE) system to manage their Ryan White Care and Prevention programs, which includes Status Neutral Service Navigation for individuals who may be at risk or who do not know their HIV Status.

This user guide will walk through the management of these records.

Security Requirements

In order to enroll and view clients in Status Neutral for your agency, you must have the program Status Neutral set as your current profile. This can be found under Tools > User Security in the Menu Bar.



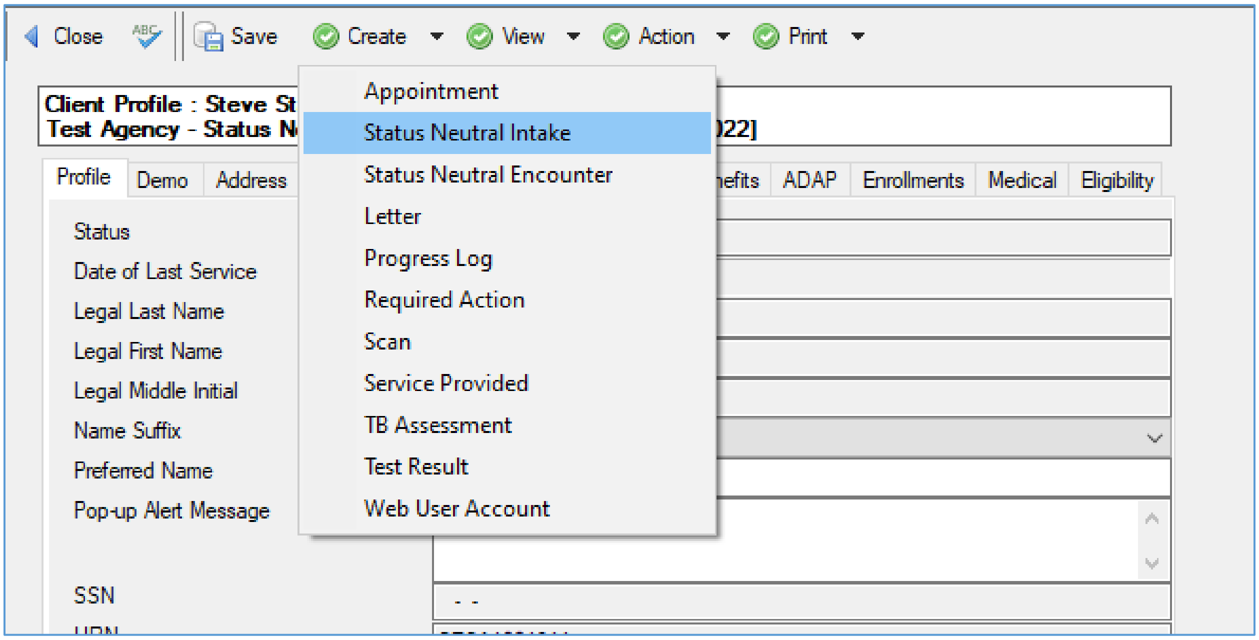


Status Neutral Intake

Status Neutral is often the first point of contact for a client seeking assistance. Therefore, the client will need to be registered into Provide Enterprise to begin the intake process. Please refer to the user guide for Client Registration – Completing the Client Profile for more information on the registration process.

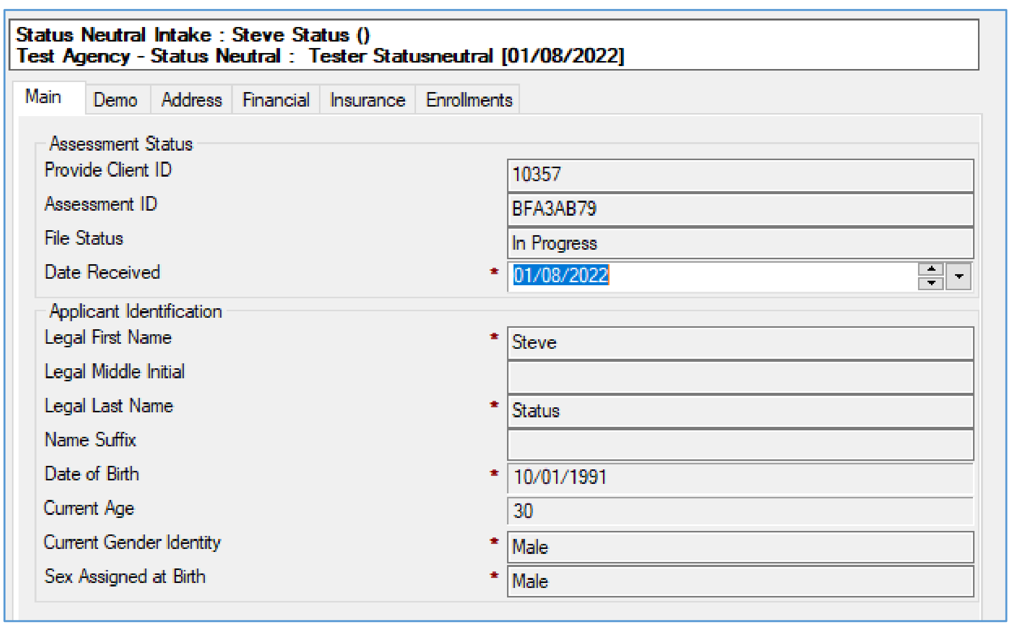
Once the client is registered, a base Client Profile is created.

From the Client Profile, click the Create button, and select Status Neutral Intake.



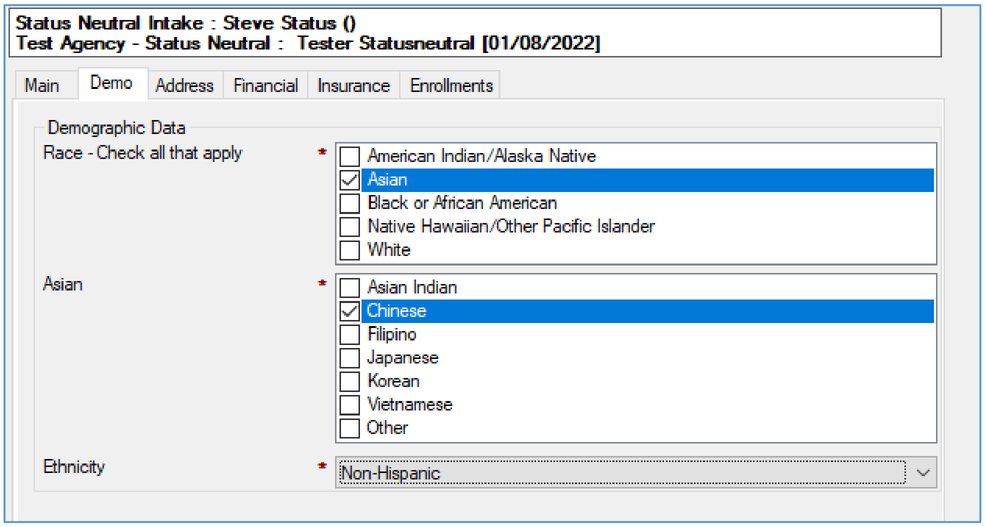
At any time in the intake process, you may click the Save button to save your updates.

Main tab:



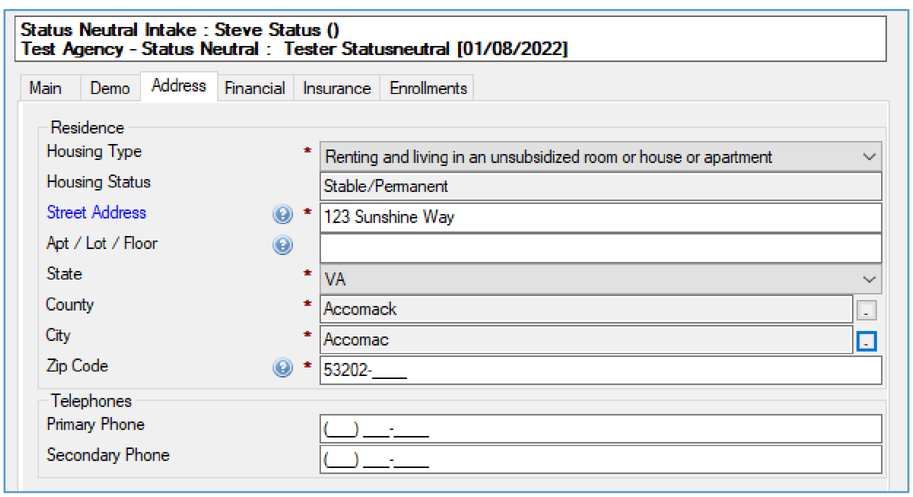
The Main tab, displays the applicant identifying information captured from the registration process.
The **Date Received** defaults to today's date, but can be edited.

Demo tab:



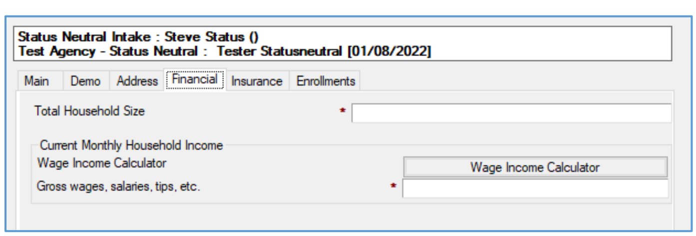
Complete the required fields containing demographic data for the client.

Address:



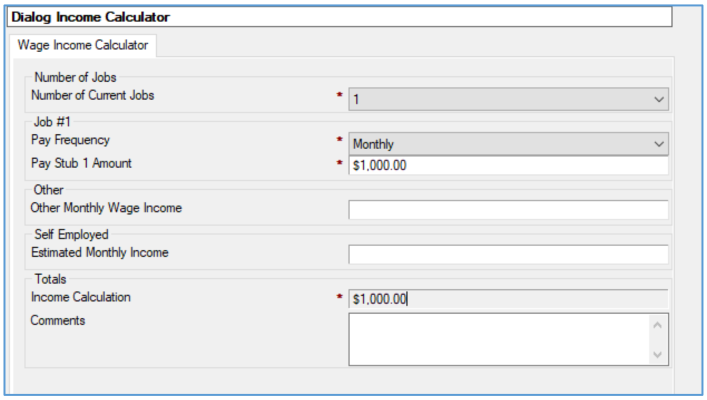
The address tab displays address and phone information captured from the registration process. Check to make sure all required fields are entered correctly.

Financial tab:

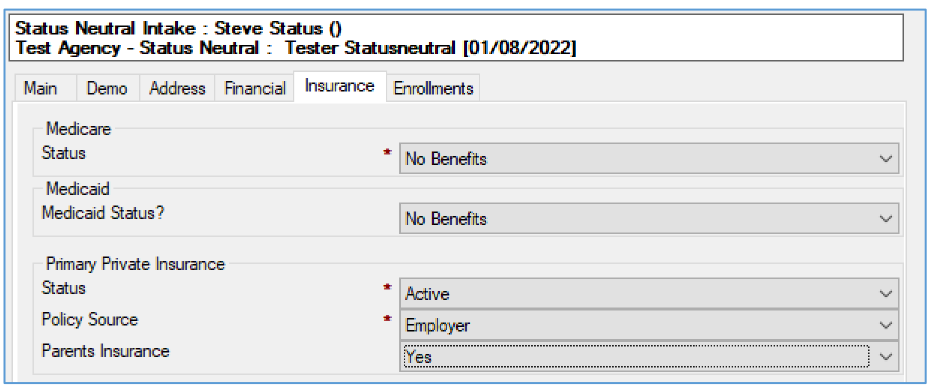


Enter the required financial information.

- **Total Household Size** – enter the number of members in the client's household.
- **Current Monthly Household Income** – enter the total monthly gross income for the household. You may use the Wage Income Calculator button to help calculate the total.



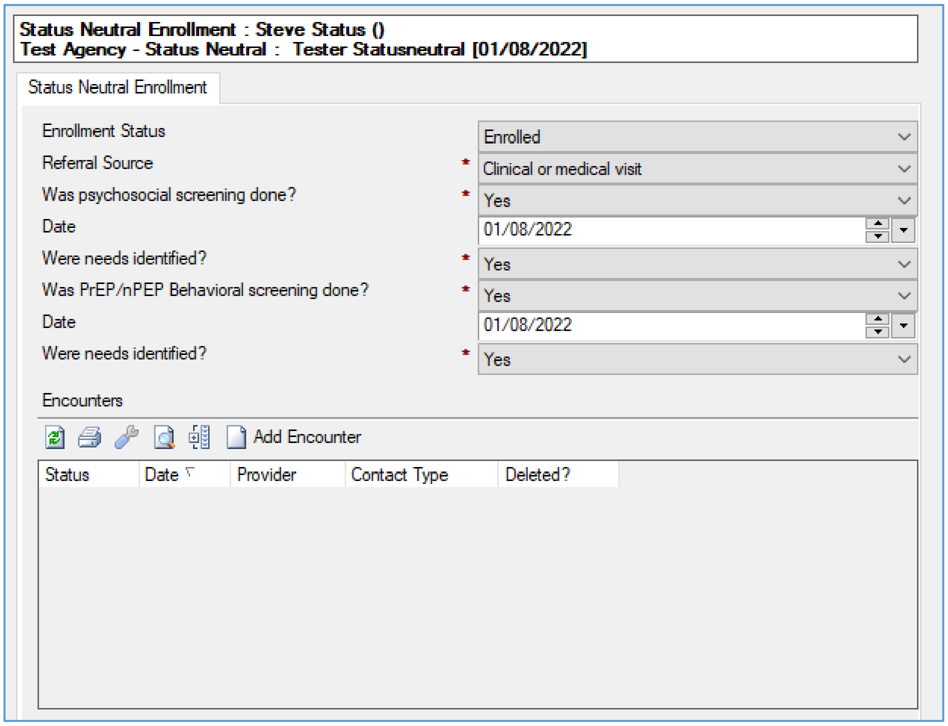
Insurance Tab:



Complete the required fields for the client's current insurance or benefits coverage.

Enrollment tab:

If you haven't done so already, click the Save button to save the intake record. The Create Status Neutral Enrollment button will be displayed. Click to enroll the client in Status Neutral.



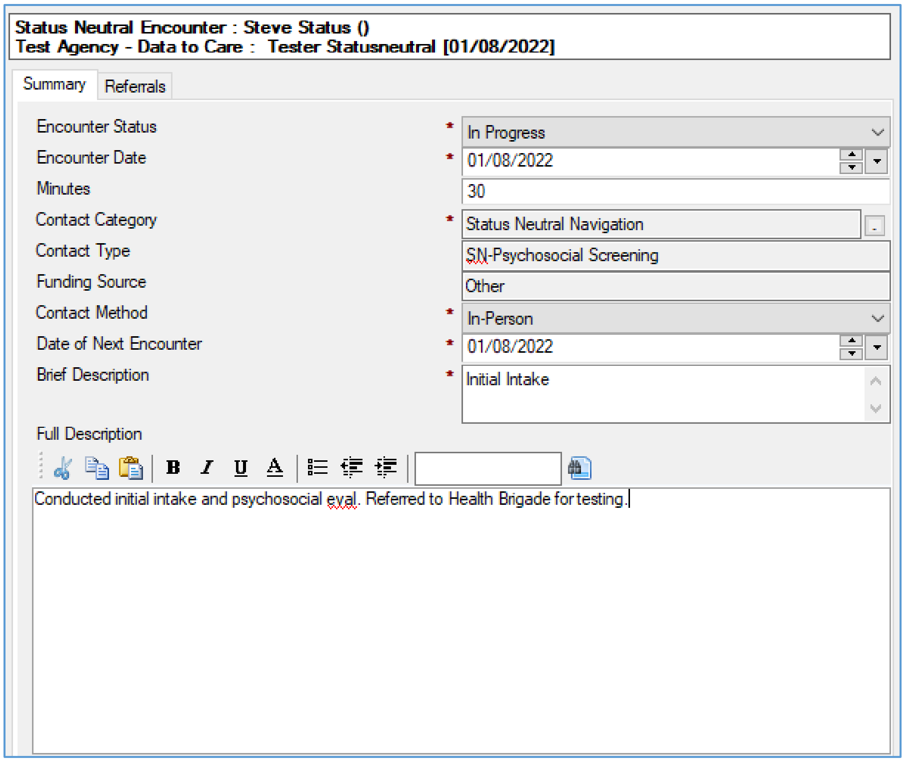
Complete the required fields:

- **Enrollment Status** – defaults to Pending, change status to Enrolled, Complete, or Denied as appropriate.
- **Referral Source** – make the appropriate selection for how the client was referred to Status Neutral.
- **Was psychosocial screening done?** – Indicate Yes or No. If Yes is selected:
  - **Date** – enter date of psychosocial screening
  - **Were needs identified** – enter Yes or No
- **Was PrEP/nPEP Behavioral screening done?** – Indicate Yes or No. If Yes is selected:
  - **Date** – enter date of PrEP/nPEP Behavioral screening.
  - **Were needs identified?** – enter Yes or No

If you haven't done so already, click the Save button to save the enrollment record.

Document the Encounter

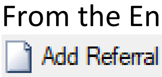
From the Enrollment record, click the Add Encounter button to document the encounter. You may document other encounters later from the Client Profile by using the Create > Status Neutral Encounter activity.



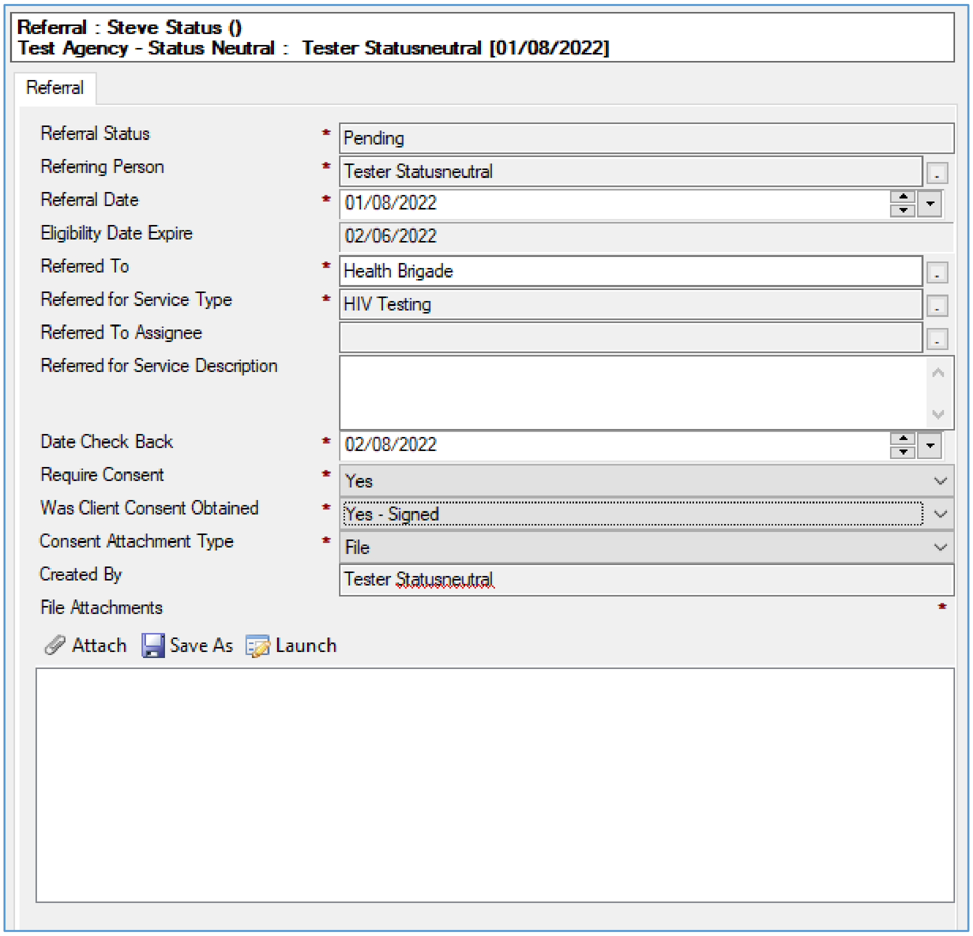
Complete the required fields for the encounter.

- **Status** – defaults to In Progress. When you have completed all the documentation for this encounter, change the status to "Complete."
- **Encounter Date** – enter the date of the encounter.
- **Minutes**- enter the number of minutes for the encounter.
- **Contact Category** – Select the appropriate Contact Type from the list.
- **Contact Method** – Select the appropriate method to indicate how the encounter was conducted.
- **Date of Next Encounter** – Enter the date for your next encounter.
- **Brief Description** – Enter a brief subject of the encounter.
- **Full Description –** Enter any detailed notes about the encounter and next steps.

Referral Tracking

From the Encounter, you may track any resulting referrals on the Referrals tab. Click the 

to create a referral.



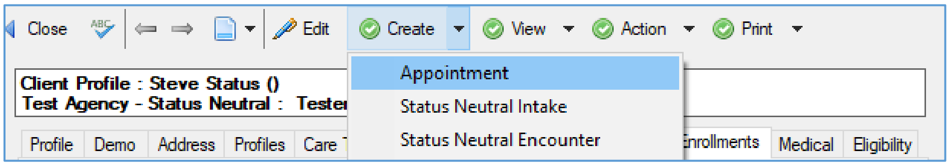
Complete the required fields and attach the appropriate consent.

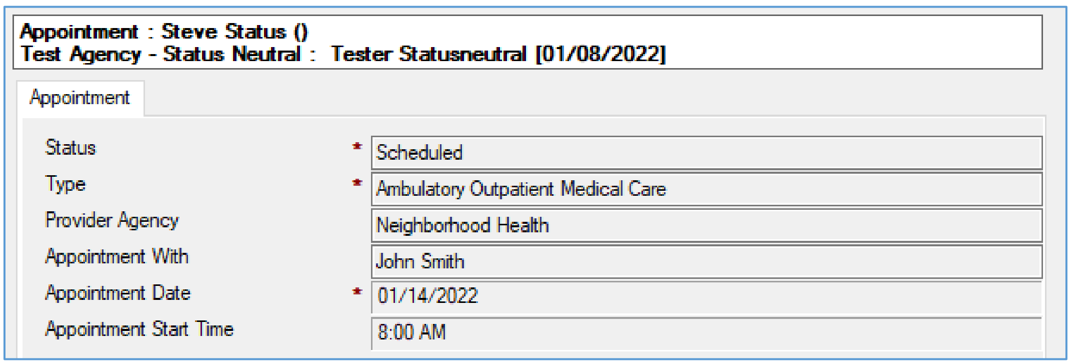
- **Referral Status** – defaults to Pending
- **Referring Person** – defaults to your user name
- **Referral Date** – defaults to today's date
- **Referred To** – Select the agency receiving the referral
- **Referred for Service Type** – Select the appropriate service for the referral
- **Referred to Assignee** – if applicable, select an individual to receive the referral. Otherwise, leave blank.
- **Referred for Service Description** – brief description of the service to be provided by the receiving organization.
- **Date Check Back** – defaults to one month from date of referral
- **Require Consent** – Defaults to Yes
- **Was Client Consent Obtained** – Yes or No, If Yes attach the signed consent form.

When all the information has been entered, click Submit button.

Appointments

Track appointments made for the client from the Client Profile by clicking Create > Appointment.





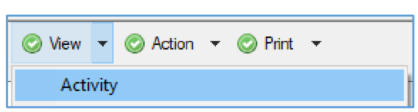
Complete the required fields to track the appointment.

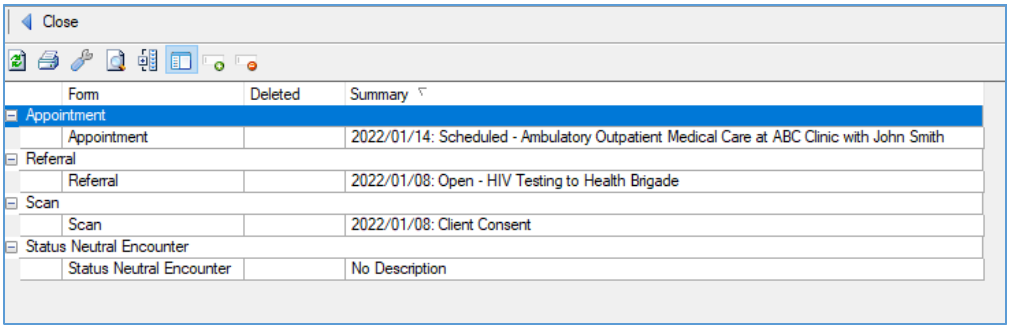
- **Status** – defaults to scheduled.
- **Type** – select the appropriate appointment type
- **Provider Agency** – type or select the service organization where the appointment will take place.
- **Appointment With** – type or select the individual provider
- **Appointment Date** – enter date of appointment
- **Appointment Start Time** – enter time of appointment

When finished you can either select Save And Create Another or Close to save the appointment.

Viewing Activity

To view activity records for a client, click the View > Activity from the Client Profile.





Form	Deleted	Summary
Appointment		
Appointment		2022/01/14: Scheduled - Ambulatory Outpatient Medical Care at ABC Clinic with John Smith
Referral		
Referral		2022/01/08: Open - HIV Testing to Health Brigade
Scan		
Scan		2022/01/08: Client Consent
Status Neutral Encounter		
Status Neutral Encounter		No Description

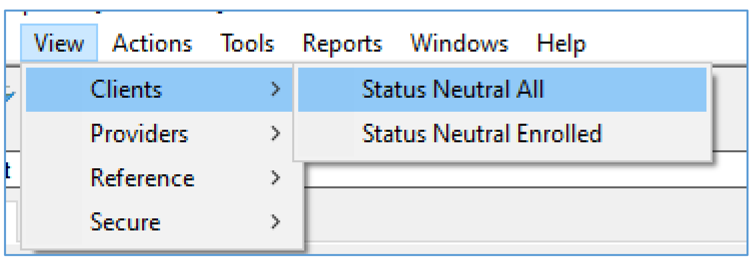
Editing Appointments

Double-click on the appointment record to open it. Then click the Edit button. You can change the appointment status to Kept, Missed, Rescheduled, or Cancelled. If the appointment was missed, rescheduled or cancelled, enter the appropriate reason.

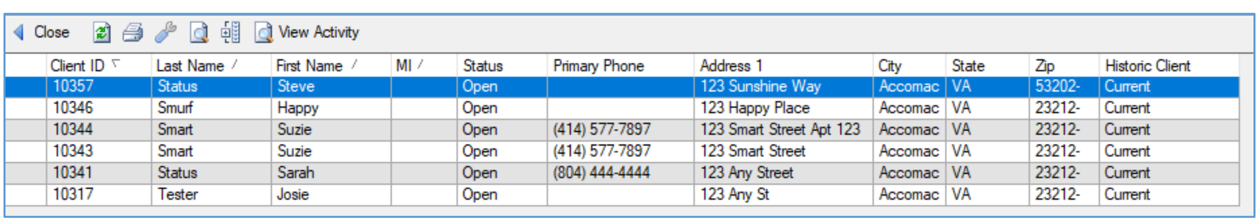
Viewing Status Neutral Enrollments

Status Neutral Views

Provide Enterprise allows you to quickly view your Status Neutral clients. To access these views, navigate to View > Clients.

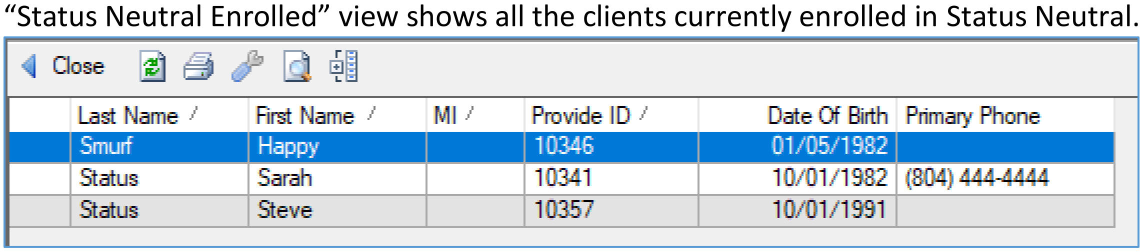


The "Status Neutral All" view shows all clients with a record in your Status Neutral Program. You can use the button to categorize the list by any of the columns.



Client ID	Last Name	First Name	MI	Status	Primary Phone	Address 1	City	State	Zip	Historic Client
10357	Status	Steve		Open		123 Sunshine Way	Accomac	VA	53202-	Current
10346	Smurf	Happy		Open		123 Happy Place	Accomac	VA	23212-	Current
10344	Smart	Suzie		Open	(414) 577-7897	123 Smart Street Apt 123	Accomac	VA	23212-	Current
10343	Smart	Suzie		Open	(414) 577-7897	123 Smart Street	Accomac	VA	23212-	Current
10341	Status	Sarah		Open	(804) 444-4444	123 Any Street	Accomac	VA	23212-	Current
10317	Tester	Josie		Open		123 Any St	Accomac	VA	23212-	Current

The "Status Neutral Enrolled" view shows all the clients currently enrolled in Status Neutral.



Last Name	First Name	MI	Provide ID	Date Of Birth	Primary Phone
Smurf	Happy		10346	01/05/1982	
Status	Sarah		10341	10/01/1982	(804) 444-4444
Status	Steve		10357	10/01/1991	